

FIG. 1

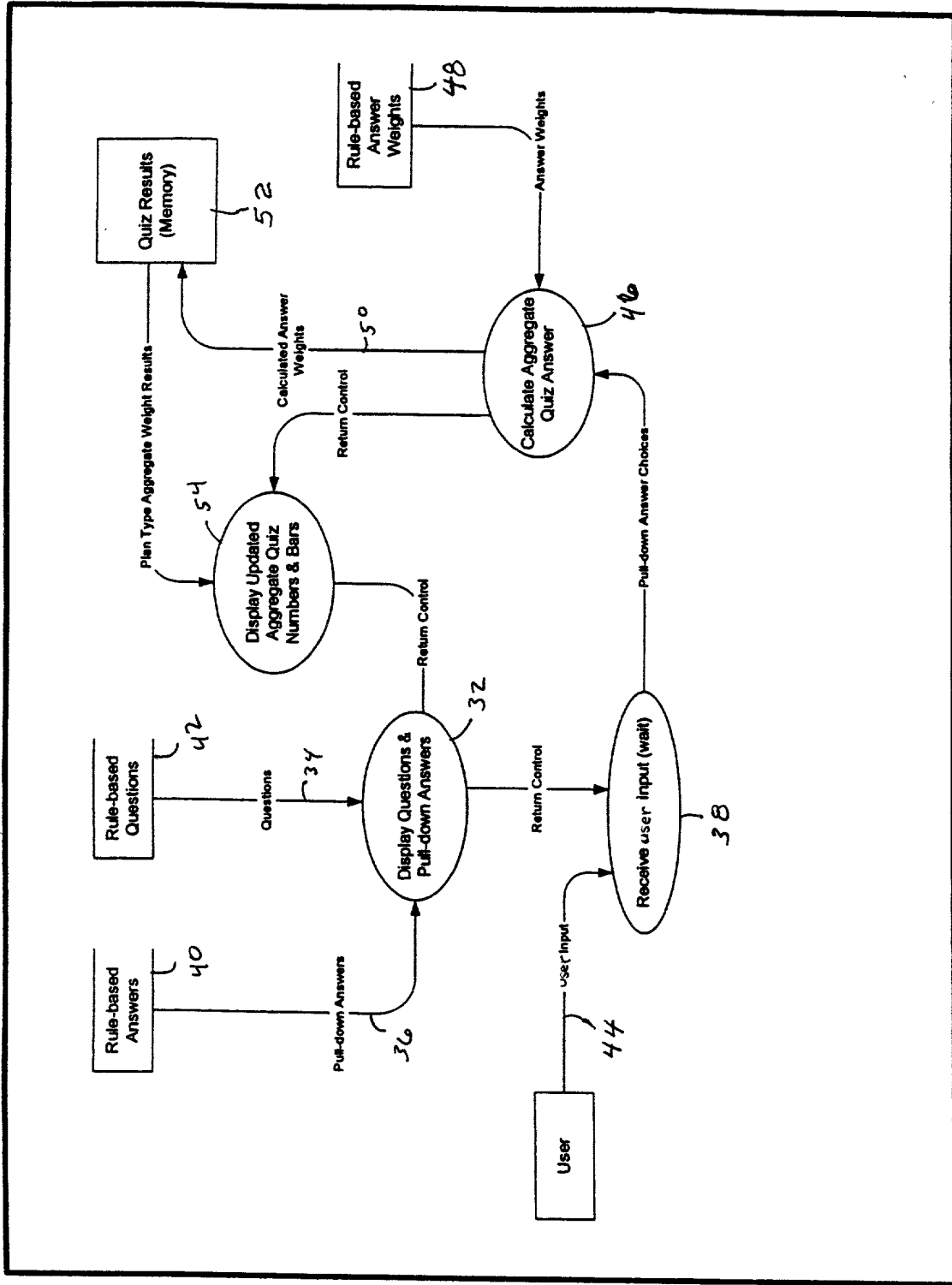


FIG. 2

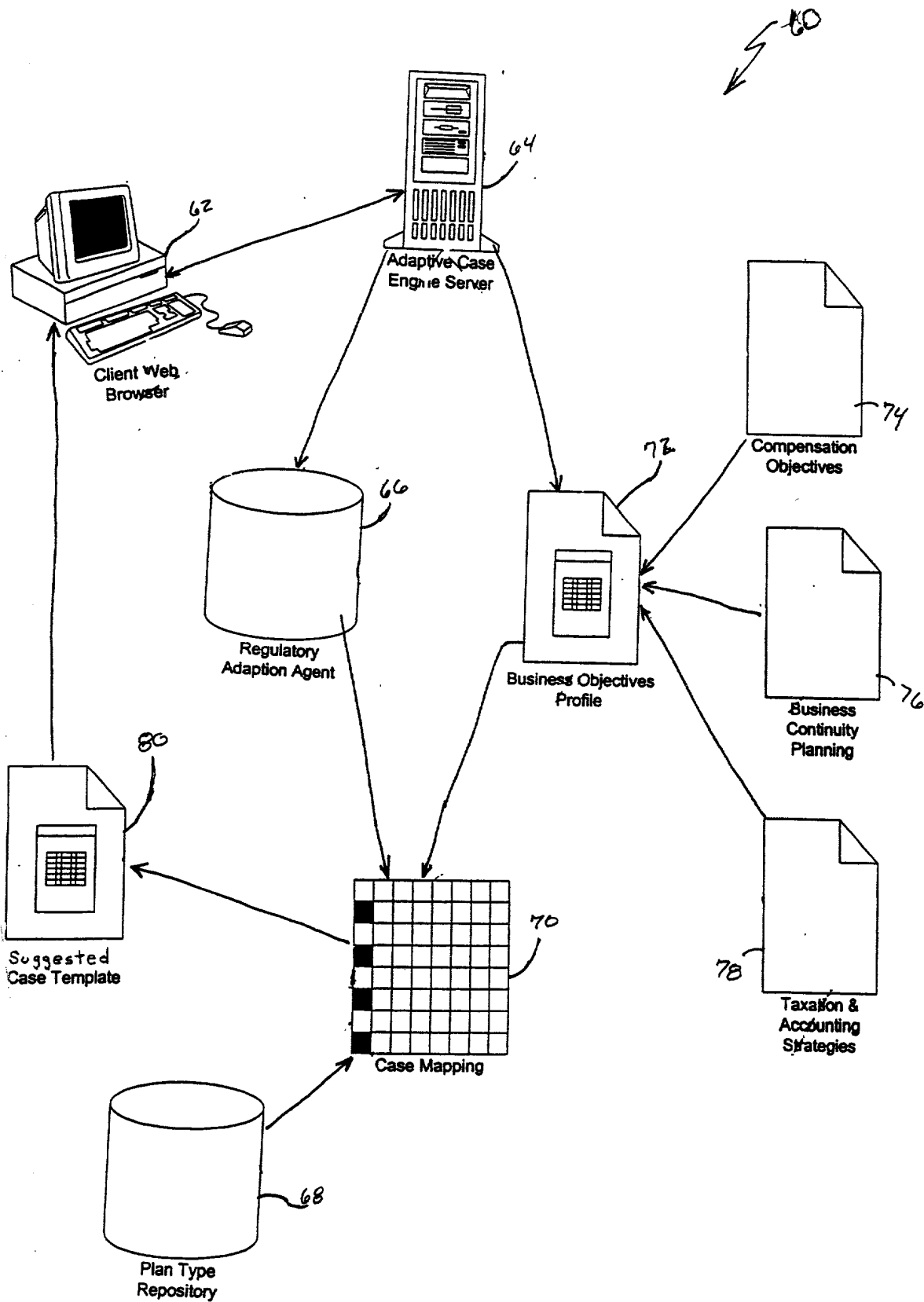


FIG. 3

TOP SECRET

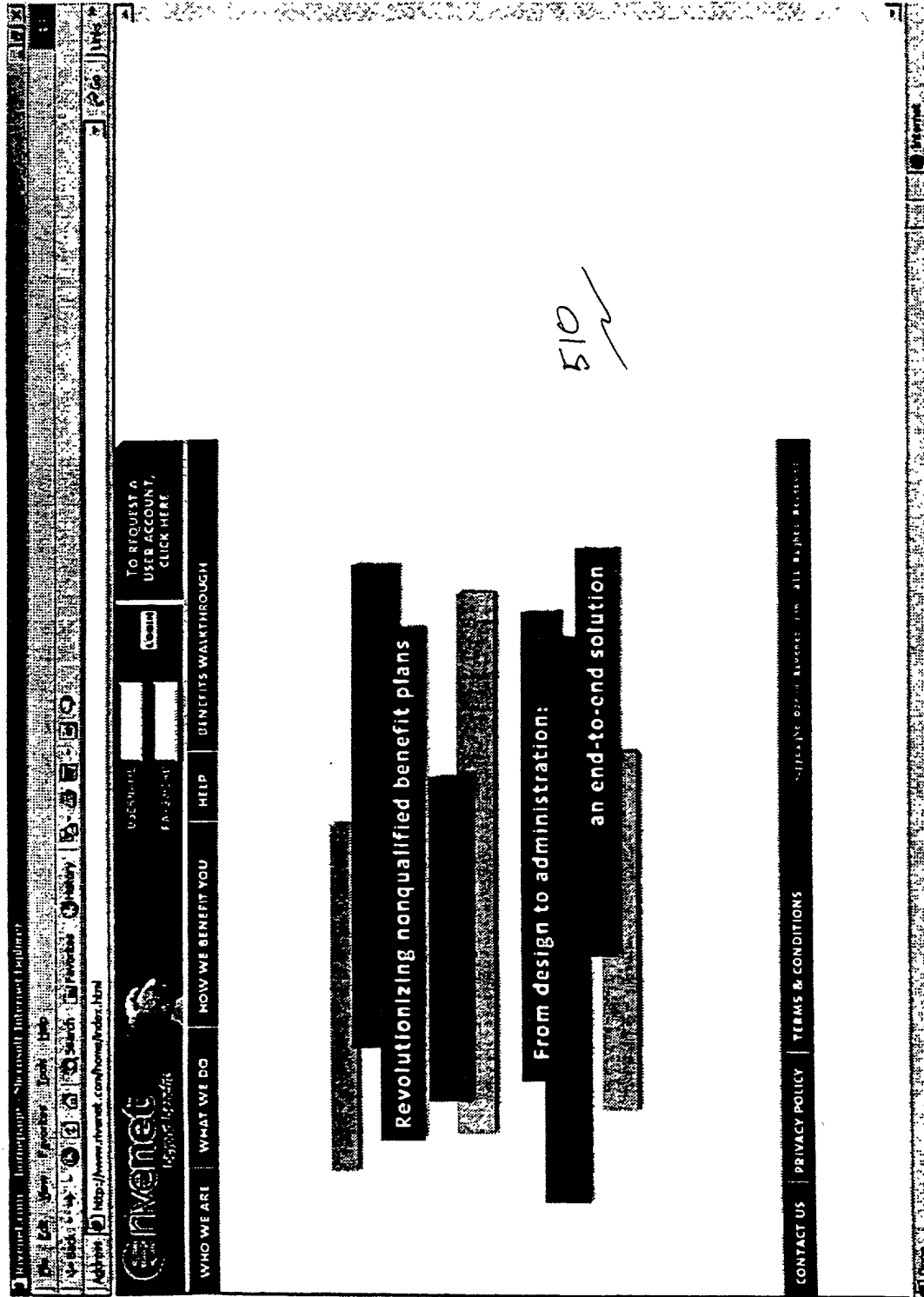


FIG. 7A 4A

Internet Explorer

File Edit View Favorites Tools Help

Address: C:\Documents and Settings\jmlr\My Documents\ScreenShotViewed2.htm

ACE20

KNOWLEDGE PROJECT

CREATE ACCOUNT

TAKE THE QUIZ

DESIGN PLAN

PLAN INFO

HOW IT WORKS

Cases

Select a case name to view group information.

514

Personal Information

Sample Deferred Compensation Plan	10237000
Sample Company Defined Compensation Match Plan	10237000
Client Company Defined Benefit Plan	10247000
Sample Company Defined Contribution Plan	10237000

TOTAL SAVINGS

about this page

This page holds a record of all the plan designs you have created so far.

To design a new plan, use the "Design Plan" button in the top navigation bar.

HOME

TERMS AND CONDITIONS

PRIVACY POLICY

HELP MENU

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FIG. 7B-4B

Nonqualified Benefits Quiz - Microsoft Internet Explorer

Which plan is best for you?

ENTITLEMENT

Defined Benefit

EMPOWERMENT

Deferred Compensation

MOTIVATION

Deferred Compensation Match

INCENTIVE

Defined Contribution

The following 20 questions will help you determine where your corporate objectives fit on the compensation spectrum. This may prove useful when determining the types of nonqualified benefit plans that make sense for you.

Take the quiz now.

Close window.

Done

Internet

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516

FIG. 7C 4C

Nonqualified Benefits Quiz - Microsoft Internet Explorer

Questions 1-3

How important is it to align the personal financial goals of your key people to your company's financial goals?

Critical to the company

How important is it to tie rewards directly to employees' long-term commitment?

Critical to the company

Which of the following best describes the single most important employee quality you want to reward?

Results

Next

Done

Internet

FIG. 7D 4D

Questions 4-8

Which statement best describes your key people's reaction to restrictions on contributions to your 401(k) plan?

No one expresses concern about restrictions

How would your key people react to a nonqualified retirement benefit plan that increases their pretax savings and company contribution potential, but has fewer of the financial guarantees of a qualified 401(k)?

They would enthusiastically utilize it.

If your business is family owned, what stage of development has been reached?

Not applicable

12

534

540

Entitlement 12

**Continental 12
(Defined Benefit Plan)**

Empowerment 12

**Compensation Plan
(Deferred Compensation Plan)**

Motivation: 30

(Deferred Compensation Plan With Employer Match)

Incentive: 48

Investment: 401(k) (Defined Contribution Plan)

4

5

538

~~7E~~ 4E

Nonqualified Benefits Quiz - Microsoft Internet Explorer

Questions 7-8

If control and management of the business has moved beyond the founder generation, how is ownership structured?

Not applicable

What is your timeframe for reviewing the company's continuity and succession plan?

Completed review within past 12 months

What is the legal structure of your company?

Sole proprietorship

REPORT

534

540

Entitlement: 12
(Defined Benefit Plan)

Empowerment: 32
(Deferred Compensation Plan)

Motivation: 50
(Deferred Compensation Plan With Employer Match)

Incentive: 48
(Defined Contribution Plan)

538

Done

FIG. 7F 4F

Nonparallel Benefits Quiz - Microsoft Internet Explorer

Questions 10-12

How many people in your company would you classify as key employees?

Under 10

Which range of salaries encompasses the largest number of your key people?

Under \$75,000

What age range encompasses the largest number of your key people?

Under 35

Entitlement: 20
(Defined Benefit Plan)

Empowerment: 44
(Deferred Compensation Plan)

Motivation: 62
(Deferred Compensation Plan With Employer Match)

Incentive: 57
(Defined Contribution Plan)

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538

Date

FIG. 7G 4G

Nonqualified Benefits Quiz - Microsoft Internet Explorer

Questions 13-15

How would you characterize your compensation position within your industry and geographic area?

Extremely generous

Which phrase best characterizes your fringe benefits position within your industry and your geographic area?

Extremely generous

How harmful has key employee turnover been to your corporate goals in the past five years?

Key employee turnover has seriously affected the company's success.

NEXT 534

Entitlement: 24 (Defined Benefit Plan) 540

Empowerment: 53 (Deferred Compensation Plan)

Motivation: 72 (Deferred Compensation Plan With Employer Match)

Incentive: 71 (Defined Contribution Plan) 538

Done

FIG. 7H 4H

Nonqualified Benefits Quiz - Microsoft Internet Explorer

Questions 16-18

How likely is it that your key employee group will expand significantly in the next five years?

Extremely likely to expand. [X]

How would you characterize competition in recruiting key employees within your industry and geographic area?

We work in an extremely competitive recruiting environment. [X]

How important is it that every compensation and benefit program be currently deductible to the corporation?

Not an important decision factor. [X]

Entitlement: 80
(Defined Benefit Plan)

Empowerment: 93
(Deferred Compensation Plan)

Motivation: 112
(Deferred Compensation Plan With Employer Match)

Incentive: 107
(Defined Contribution Plan)

534 540 536 538

Done

FIG. 7I-4I

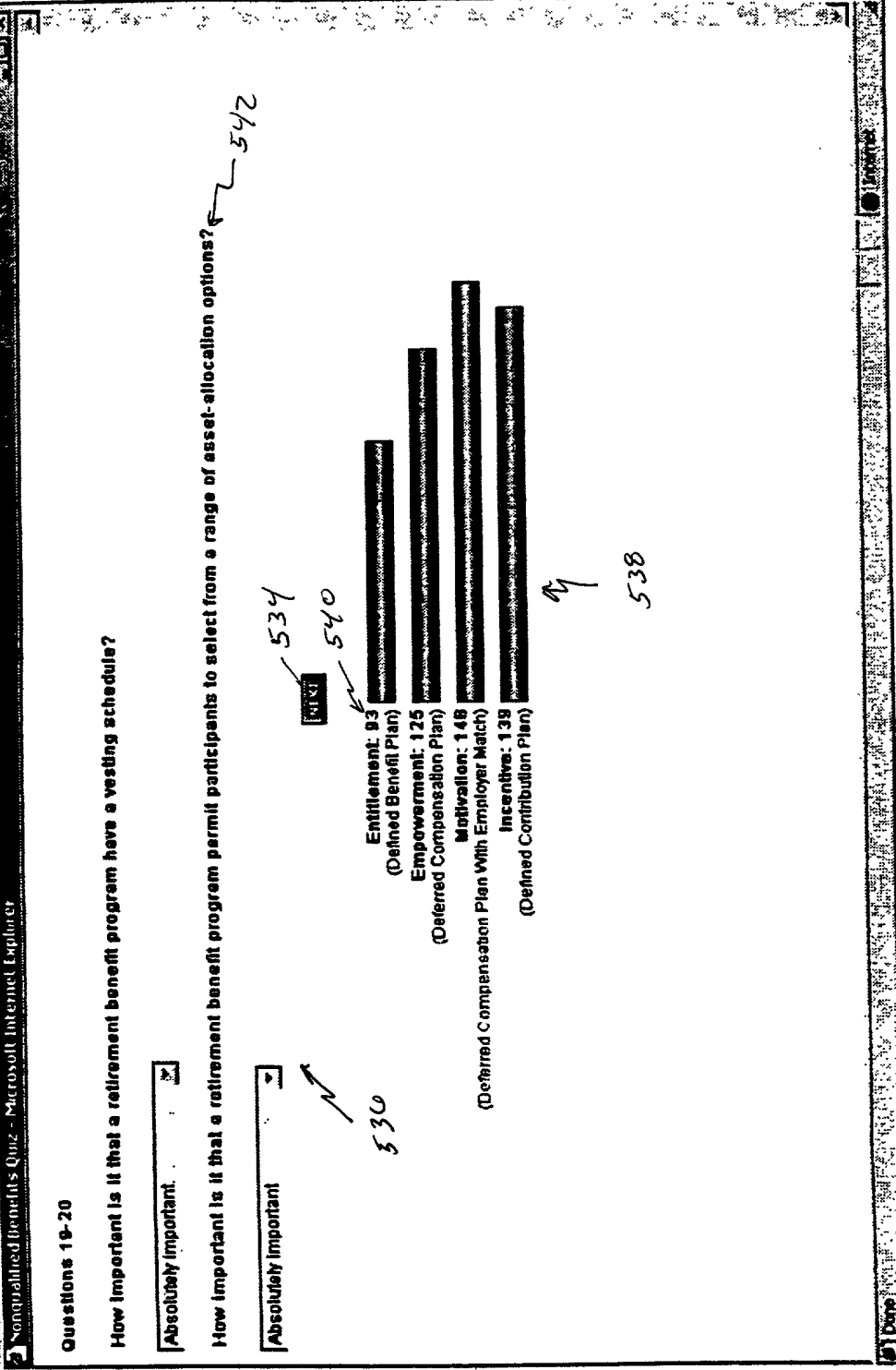


FIG. 75 45

http://10.10.39.1:7001/quiz/quiz_controller.jsp - Microsoft Internet Explorer

The results of your quiz:

544

545

Entitlement: 105
(Defined Benefit Plan)

Empowerment: 137
(Deferred Compensation Plan)

Motivation: 172
(Deferred Compensation Plan With Employer Match)

Incentive: 183
(Defined Contribution Plan)

Based on your answers, it appears the Deferred Compensation Plan With Employer Match would best fit your needs since you scored highest in the Motivation category.

Close window.

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Date

Internet

FIG. 7K 4K